Intentional CollaborationTM Case Writing: Lessons We Wish We Had Known Before We Started



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Dear reader, you have in your hands the article we wish we had read when we started our case writing efforts many years ago. We have both written and published extensively, solo and with coauthors from all over the world. We have also learned the hard way that although collaborating in a case tends to result in more substantial cases, doing so without a common understanding or an agreed-upon road map can result in numerous frustrations or additional, unexpected work, and leave you wondering if the outcome was truly worth the process you had to endure. We want to help you identify potential challenges and frustrations in advance, and even better, before they start, to ensure the process is more satisfying and productive for all parties involved, while also highlighting the numerous benefits that collaboration can provide.

If you have found yourself working as a shepherd dog, herding colleagues to bring a case to the finish line, you may find this article helpful when tackling new projects. We also wrote this article with new case writers in mind, so we can encourage you to begin setting expectations with your coauthors from the beginning. We also believe that for those who have always written on their own, perhaps because that is what you can control or are most familiar with, seeing some guiding principles to support best practices may give you the confidence or incentive to share your writing process with others and discover unexpected benefits through the process.

There is plenty written on collaborative writing in the mainstream scholarly literature. Still, except for some exceptions (see Module 8 in Vega, 2017), we had a hard time finding an action-oriented text that could guide our case team writing engagement. This gap prompted a 2023 NACRA New Views session¹ about case author collaboration, which we have turned into this article.

The article contains an explanation of collaborative writing grounded in literature, reviews the challenges and benefits of writing cases with coauthors, and finishes with an action-oriented collaborative model for intentional writing. We have also included references, additional resources, and a checklist that could be used to frame early conversations on potential joint projects.

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¹ We thank the participants in our 2023 NACRA New Views session held in San Antonio (Texas) for their inputs and feedback

WHAT IS COLLABORATIVE WRITING?

The working definition we will use throughout the rest of the article is: intentional team case writing involves a deliberate and purposeful commitment to co-produce an integrative and mutually beneficial outcome that respects the individual perspectives and goals of each coauthor. What this does not represent is someone who reviews a completed case and provides suggestions on how to improve or enhance it without contributing to its development, or a coauthor who gets directed on what and how they are to contribute, with little input into the decisions or the case writing process. We also recognize that there are case writers who prefer to work solo - the lone wolf metaphor (also known as Lone Hero Researcher, Sandberg & Ibarra Rojas, 2021); if you are one of these, we would still encourage you to consider the collaborative approach and the value it may bring.

Some of you may be engaged in a collaborative case research process without paying a lot of attention to how it occurs, or may use this method for only part of your production, while others may intentionally seek out opportunities to work deeply with others. For these reasons, we want to discuss the nuances of co-writing more generally, and then with application to case writing, to provide a model that preserves and respects the coauthor relationship.

Starting with a simpler definition that focuses on the outcome of the process: Anderson (1995, p. 195, as cited in Ryan, 2012, p. 145) refers to "writing involving two or more writers working together to produce a joint product." Expanding upon this meaning, Sandberg & Ibarra Rojas (2021, p. 4) highlight the additional intricacies that come from moving beyond the self to others when you need to get consensus on a joint product. "Team writing is the process of writing text that requires the involvement and agreement of more than one person considered by each other as coauthors." In case writing, this could include dividing up sections of a case or instructor's manual (IM) between authors, with an outcome that represents an integrative product, without a lot of negotiation between roles.

While we agree that co-writing is a feature of collaboration, we want to move beyond the transactional elements to highlight the additional complexities and tensions that can occur. Rhodes & Lin (2019, pp. 73-34) speak to this when they comment that "an ideal collaborative partnership is one which includes the co-construction of new ideas or knowledge, rather than a piecing together of individual concepts, with limited interaction," and make an argument about looking for people with common areas of expertise to enhance this process. While we acknowledge these partnerships can enhance the quality of the final product, we also recognize they can cause potential tensions, such as an increased likelihood of conflict and a more significant time investment than working individually. One of the reasons cited is that collaborative writing "... involves the negotiation of roles and responsibilities, sometimes revealing underlying assumptions of power in the partnership," (Clark & Watson, 1998, as cited in Rhodes & Lin, 2019, p. 72). How these issues get resolved could be impacted by the experience, seniority, reputation, and personality of the coauthors, to name just a few reasons, which is why we want to provide a reference that anticipates the areas you will need to discuss and resolve to get your case to the finish line.

BENEFITS & CHALLENGES

We acknowledge that because you are co-creating with others, there are challenges in the process, and we also recognize that richer outcomes may be possible, which we have highlighted in this section. Among the **benefits**, we would like to point out:

- 1. Access to new writing opportunities: collaborating with coauthors allows you to explore new topics and perspectives that you might not have considered or access an organization you didn't have a connection with before.
- 2. Immediate peer review & fresh point of view: coauthors provide instant feedback on your work and offer fresh perspectives, helping to refine ideas and improve the overall case and IM quality.
- 3. Higher productivity: with multiple minds and hands working together, tasks can be divided and completed more efficiently, leading to higher productivity. Having coauthors to respond to, periodically, builds much-needed accountability when your calendar gets busy with other academic engagements.
- 4. Co-creation leads to synergy and learning opportunities: collaboration often results in co-creating ideas and solutions greater than the sum of their parts and fostering innovation and creativity in both the case and the IM. While you enter the collaboration with strengths, the process also helps to improve your weaknesses, as well as learn about theories and methods that you were less familiar with.
- 5. Enriching a global network: working with coauthors from diverse backgrounds helps develop a global network, providing broader perspectives, cultural sensitivity, and specialized knowledge and/or expertise. We have been able to write about organizations located in countries that we have never visited thanks to the expertise and on-the-ground work done by a local coauthor.
- 6. It is fun: as explained by Aristotle, individuals are "zoon politikon" (understood as social beings) and thrive when connecting with others. Team writing allows one to engage with others for a common purpose, and if you choose your authors wisely, you will enjoy the time spent together. For example, one of us lacked enthusiasm due to previous isolating writing experiences, and really valued when her coauthors would come together to make strategic decisions on the case, provide suggestions on each other's work, or debate reviewer feedback.

Among the **challenges** that we have experienced in different case writing projects, we highlight:

- 1. Misalignment between career goals: authors may have different career priorities (e.g. tenure vs. untenured), timelines, and publishing goals, which can affect the speed, focus, and direction of the writing process.
- 2. Power or status imbalance: unequal power dynamics, or different levels of authority and seniority among coauthors, can create tensions. With three or more coauthors there could also be uneven factions that hinder effective collaboration. It is also worth highlighting that a gendered perspective on academics has pointed out the "relational" women and "autonomous" men as a source of potential conflicts in scholarly collaboration (Ghaempanah & Khapova, 2023).
- 3. Ideological differences: differing perspectives or ideologies among coauthors may lead to conflicts or disagreements regarding the direction or content of the case. This issue can manifest in divergent ethical considerations, for instance, using GenAI for case writing or authorship order based on seniority vs. contribution.
- 4. Differences in writing and communication styles: varied writing styles or communication preferences may result in inconsistencies or difficulties in integrating each contribution smoothly. These difficulties may be aggravated when working with colleagues from different countries or cultures whose mother tongue may not be the same as ours.

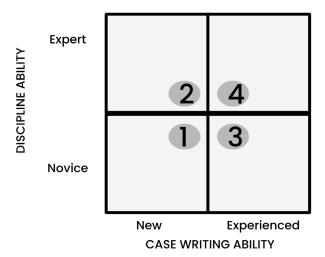
- 5. Schedule and logistical coordination: coordinating schedules across different time zones or conflicting commitments may slow the writing process. Team members may also have differing preferences for how they organize document sharing or other activities such as team meetings.
- 6. Potential for frustration: miscommunication, conflicting ideas, or differing work habits can lead to frustration and strain on coauthors' relationships. This is usually the main argument that "solo" case writers share when explaining their preference to write cases independently.

We have engaged in case writing involving four authors across three different time zones with different work priorities at different stages of our tenure track careers and while the issues listed above manifested often, reflection, transparency and open communication helped to navigate those challenges.

SELF-REFLECTION: WHO AM I AS A CASE WRITER?

"Nosce te ipsum" or "Know thyself" is the philosophical maxim inscribed on the Temple of Apollo in the ancient Greek precinct of Delphi. The first step when we enter any writing collaboration should be a self-reflection about our own strengths and shortcomings as case writers in general, and specifically regarding our new collaboration. To guide this self-reflection, we developed a simple 2 x 2 table. On the x-axis, we track our own experience as case writers (new vs. experienced), and on the y-axis, we suggest reflecting our expertise in the applicable discipline (expert vs. novice). As captured in **Figure 1**, this leads to a typology of authorship.

Figure 1: Case writers' typology



Source: Created by authors.

This self-reflection could help you to set your individual goals. It would also help to prepare you for those difficult and critical conversations that are highlighted in the checklist that we share in **Exhibit 1**. One of us, situated at point four in the above figure, worked with a colleague in a case collaboration with two others, where the third author was situated at point one. It was a very successful collaboration, and one year later, this third author had moved to point two and led another case collaboration with

the same author. Although still new to case writing, her confidence and expertise in the discipline provided the background to lead the case development process, complemented by the more experienced case writer, demonstrating reciprocal benefits to both coauthors.

We have also published with novice case writers (point one) that not only had access to the organization's decision maker but were willing to learn and put considerable work and effort into their first case. One of us has also published in a distant discipline (acting as a 'three' in that collaboration) but had guided the coauthor (a 'four) in the case publishing complexities of a demanding outlet.

MODEL FOR INTENTIONAL COLLABORATIONTM

We have developed a 'Model for Intentional CollaborationTM to bring to life what the stages of this process can look like and to imbue some strategies from the research to increase the likelihood of success. The three phases – Courtship, Dating, and Commitment – although reminiscent of a more 'romantic' connection, are used to illustrate how to foster relationship-building and engagement with your coauthors.

1. **Courtship**: searching for people whose goals and values align with yours.

You may be approached by case writers asking you to participate in a writing project together, or you may be the initiator of this collaboration. Seeking out individuals with whom you can have a 'professional friendship relationship' is what Ness et al. (2014) claimed should be the ideal goal. We do not believe you have to know these coauthors in great depth or be friendly with them outside of the case process, but we do believe you need to have a mutual recognition of each other's strengths and willingness to work together over months and sometimes even years to meet your case writing goals. Characteristics when looking for collaborative writing partners can include:

[...]reliability, openness, sharing, respect, genuineness, warmth, honour, support, being non-judgmental, empathy, open to challenging each other, being non-directive, loyal, advocate, congruence, understanding, honesty, rapport, active listening, awareness of needs, shared values, trust, confidentiality, intuition and caring (Gardiner, 1998, as cited in Ness et al., 2014, p. 3)

We believe if you can seek our partners who demonstrate these kinds of qualities from the beginning (see the section below on how to find coauthors), it will make the heavy lifting of completing the work together much more enjoyable. For us, it has been critical to finding collaborators who are trustworthy and reliable (doing what they say they will do), open and sharing (not rigid or fixated on only their ideas), while also willing to challenge each other and appreciate the expertise on the team (respectful discourse). This point is also a good time to go back to the matrix in **Figure 1**, and understand what quadrant you and your coauthors sit in. Different combinations bring their own opportunities and distinct challenges (for example, mentorship or learning in a new discipline), and in our experience, all possible arrangements could lead to a positive collaboration if there is transparency and early understanding from this phase on.

2. **Dating**: figuring out effective ways to work together

To ensure you are fostering a harmonious writing process, Silverman (1999, pp. 144-146, as cited in Ryan, 2012, pp. 145-147) believes coauthors should:

- illustrate a dependable and equally enthusiastic approach to the project to ensure that deadlines are met, and similar levels of effort are invested in the process;
- demonstrate compatibility between critical perspectives and theoretical approaches; and
- showcase mutual respect between coauthors and a willingness to compromise and negotiate.

During the dating stage, you are exploring ways to contribute as a team, identifying roles, timelines, and methods to share and review work, and sizing each other up to see if this collaboration will work. This is similar to a new couple who is discovering what roles you will each play in the relationship, whether you enjoy doing activities together, how you make decisions together, and so forth. You can expect some tensions, disagreements, and even conflict, which, if openly discussed, can foster trust and lead to a productive and even great outcome or synergy, as compared to working individually. However, if you choose not to voice concerns, engage in 'groupthink' or 'bandwagon' effect (Uhl-Bien, Piccolo, & Schermerhorn, 2023), or instead stay mirrored in resentment or frustration, your satisfaction with the overall process could be greatly diminished. As in a new couple, failing to disclose negative perceptions, or feeling uncomfortable to speak up, will consequently fail to build the trust and comfort for deep relationship building.

One strategy is to test your working relationship prior to agreeing to a case collaboration with smaller, less intensive processes, or to engage in more regular collaborative processes so you can gain experience and meet potential coauthors. Ness et al., (2014) recommend starting a collaborative writing group with a common purpose and manageable goals, that utilizes people's strengths and develops their weaknesses, requires participants to listen to each other, have fun, and be flexible, but keeps the momentum going with regular meetings, and encourages individuals to support each other when work or other commitments peak (p. 4). One of us engaged in a practitioner-based case for a nonprofit organization with another coauthor, and saw how effectively they could work together. Although she led the process, she knew the work benefitted greatly from this collaboration and invited this individual to co-write an academic case together which also provided a very similarly positive experience. Reviewing cases for conferences or publishing outlets is another way to start low-stakes collaborations that could lead to case writing engagement. For instance, one of us reviewed cases for several NACRA tracks and later was invited by one of the chairs to work together.

3. **Commitment**: agree on roles and responsibilities and the collaboration model.

At this stage, you are convinced that a collaboration can be successful, and you are willing to commit to working together on the case writing process. Although key components of the relationship and its development may have been discussed, this is where you need to set a firm commitment of your intent to formalize this relationship. Similar to a personal relationship, this may be when you commit to each other and publicly 'announce' that you are willing to choose this person specifically, and are even more motivated to work through any issues you face because you believe the resulting relationship is worth the effort. We have created a checklist in **Exhibit 1** to highlight all the areas we feel are important to discuss with your coauthors once intentions are clear, to ensure there are no incorrect assumptions or misunderstandings that could cause issues further down the process. These conversations could happen informally or, if preferred, documented through meeting minutes or action steps to keep everyone

on task. For example, when both of us have worked together on a case, we have kept records of writing and research roles, timelines, and what online systems we are using for writing and communicating, so we have something to refer back to and ensure we are in alignment with each other. Another example of more formal documentation is what Berndt (2011) calls 'collaborative research agreements,' which "cover roles and responsibilities of the research team, as well as the mutual and individual expectations of the members, addressing common core issues such as:

- identifying the overall goals of the research
- determining who will perform various tasks
- scheduling activities and deadlines
- choosing a communication strategy
- setting rules about situations or behaviors that are likely to result in conflict (e.g. authorship, failure to meet deadlines, and additions or removals of research members)" (p.487)

Identifying how to resolve conflict can be helpful if you have encountered difficulties with members of this team before, or conversely, if you have never worked together and are unclear how the process will unfold. This is similar to what we have used in classrooms with our students and referred to as team agreements, project contracts, or team charters.

Another component to discuss is how you will conduct the work together: what will the process of writing together actually look like? Ryan (2012) has proposed two models that can work for co-writing cases that showcase different methods of how contributions come together into a final product. One example, the parallel model, describes a process that, "after various meetings and discussions to organize an article's direction, authors are 'allocated' specific sections and work together in parallel on concurrent writing tasks," (pp. 150-152). We have found this method works well with more experienced case writers who can work independently on their sections and are knowledgeable about what an ideal case and IM end product looks like. In contrast, the vertical allocation model is "written incrementally without authors working together concurrently. For example, one author provides a draft of a paper, and another author takes the document and advances this material-this may include adding sections, building and rewriting the argument, and so on. The article is then passed onto the next author and then possibly returned to the original author to advance further," (pp. 150-152). We have found this may be more appropriate when you have quite a range of experience in the case writing team. The more experienced case writer can start and lay out the case and IM, and provide a bit more direction, if needed, on how or where to contribute or where their gaps are while also benefiting from the critique and review of their developments to date. However, we note that each method can be adapted to your unique case situation and team.

Although these models are not specifically related to case writing, they provide examples of how the division of writing can be allocated and whether the process is more individual or group based. We argue it is important to discuss how the coauthors envision the mechanics of the overall case completion to occur. It is also beneficial to identify platforms to host and review the work, as well as communication channels for discussion and feedback. We strongly believe that having the insight and courage to openly discuss all of these potential hurdles during the three stages of the Intentional CollaborationTM Model can enhance the experience and outcomes. It can also reduce possible friction points between coauthors, some examples of which we have demonstrated in the case examples section below.

Exhibits 2 and **3** include three possibles scenarios and responses in a case team writing collaboration. We prepared these materials for the NACRA 2023 workshop and included them in this article to facilitate your reflection and guide the conversations on your future writing engagements collaborations.

How to FIND COAUTHORS

It was our intention to convince you that an Intentional CollaborationTM could lead to a higher and more fulfilling case writing productivity. An important consideration at this point relates to where to find these coauthors. In our experience, writers may invite you to participate in their projects but sometimes you could be the one looking for collaborators. Below, we propose a list of 'tested' sources that could be handy when you are actively seeking a writing companion.

- 1. Colleagues within your institution: reach out to fellow faculty members, researchers, or graduate students within your institution who have expertise or interest in the subject matter or in case writing. Don't underestimate the power of the water cooler or "corridor conversations" (Ness, et al., 2014) to spark that common interest. For one of us, this was the first place she looked to find coauthors, as she had experience working with them on other projects and already had a rapport and a respectful relationship established.
- 2. **Academic networks**: utilize academic networks such as Special Interest Groups, LinkedIn groups, or even academic platforms such as ResearchGate or Academia.edu. Once you identify a case scholar and become familiar with their cases, a warm invitation email, especially if you have access to an organization or informant and propose a clear path forward, could be very effective.
- 3. Academic conferences: attend conferences, workshops, and seminars. These could be generalist (for instance, Academy of Management or Administrative Sciences Association of Canada), discipline based (for instance, the US Association for Small Business and Entrepreneurship) or specialized on case research (such as North American Case Research Association or the Latin-American Case Association). Sitting in case roundtables and hearing feedback from others, participating in workshops from case writers, and reading work by other case writers in reviews is another way we have met and learned about other case authors in enough detail that we believed a collaborative partnership would work.
- 4. **Faculty development programs**: participate in faculty development programs or workshops focused on case teaching and writing. These could be organized by your own university or by other organizations (The Case Centre, NACRA, etc.).
- 5. **Students**: consider collaborating with students, particularly graduate students or advanced undergraduates, who may bring fresh perspectives and insights to the writing process. These projects could take the form of a direct study, but they could also be embedded in a course (Beal, MacMillan, Woodwark & Schnarr, 2016). One of us has incorporated a case with a student, who was also a protagonist, through a directed studies course, allowing a very intentional way to mentor an emerging researcher into the case discipline.
- 6. **Alumni networks**: engage with alumni who have pursued careers relevant to the subject matter. They could be interested in collaborating or providing

- insights based on their professional experiences and are probably thrilled to hear back from you.
- 7. **Organizations**: suggest coauthoring with the protagonist or with an employee of the feature organization, or even working with an academic who happens to be the organization's founder or CEO.

CONCLUDING THOUGHTS

There is a Spanish saying, "It's worth more to be once red than a hundred times yellow." We certainly embrace the idea that it is better to clarify things up front with coauthors than forge ahead with the case work and have disagreements at the end of the process because things weren't discussed properly. In this article, we hope to have alerted you to the broader issues that should be addressed and provided some possible strategies and tools to guide these early discussions, so they do not hamper or hijack the satisfaction or quality of the process. However, the most important takeaway is that team writing is an enriching and productive endeavor, and we encourage you to 'take the plunge and wade in' you will never know what you are missing if you never try. We would also enjoy hearing your stories and learn how your intentional case writing collaborations are going, and any other lessons or strategies you would like to share.



Checklist

Intentional Team Case Writing

- Goals for the case
- Career expectations
- Time available and priorities
- "What I enjoy the most is..."

CASE ABILITY

ABILITY

- New to case writing
- Some cases written but unpublished
- Some cases published
- Experienced author

DISCIPLINE

- Novel
- Practical knowledge
- Practical & theoretical knowledge
- Guru

RECOGNITION

- Authorship order
- Royalties & stipends distribution

INTERPERSONAL DYNAMICS

- Positive chemistry
- Not so positive chemistry

LOGISTICS

- Writing process
- Data storage & communication protocols

PREPARED BY MARIA BALLESTEROS-SOLA, KYLEEN MYRAH & MIKE ANNETT

Source: created by authors.

Exhibit 2 - Case Scenarios

These are possible case writing collaborations situations that you could face. We encourage you to read each one, identify the team's strengths, recognize where challenges could occur, and identify guidelines that would be important to get consensus on before starting together as a team.

Exhibit 3 provides possible answers to these questions, and could be a worthwhile exercise to complete together with your team as a way to open up the dialogue and reflect on the unique characteristics that your collaboration brings.

Scenario One

- •You are an experienced case writer who has never coauthored with a protagonist until now.
- •The nonprofit leader is excited to write the case with you, and although they have never written an academic case before, they do have a master's degree in leadership and want to showcase all of the strong cultural aspects they have implemented in their workplace.
- The case protagonist lives in the same city as you.

Scenario Two

- •You are a new faculty member with a newly minted Ph.D. You took casework in your schooling and are keen to start publishing in this genre.
- •You have teamed up with a senior faculty member in social entrepreneurship who has written a significant number of cases and is well-known in the field (in fact, you used their cases in your classes), and you share a similar background in the discipline.
- •She has also brought on to the team a colleague of hers, who has a strong background in case development but in a different field, accounting, and who works for a different university.
- You and your senior colleague are in the same location and the other faculty member lives in a different location in the next state over.

Scenario Three

- •You are three experienced case writers who all share a passion for strategy and have used each other's materials in your classes.
- •You all live in different countries (one colleague is in Canada, one in the US, and one in Europe). Two have English as their first language, and one has English as their third language.
- •You are all Associate Professors with rigorous academic research expectations from your institutions.

Exhibit 3 - Responses to the Case Scenarios

Scenario One

STRENGTHS OF TEAM	 Nonprofit leader is receptive to having the case written about their organization and has an academic background. There is an experienced case writer on the team. The two coauthors live in the same location, so there are opportunities for face-to-face collaboration, and both are in the same time zone
POSSIBLE CHALLENGES OF TEAM	 This will be the first time the two coauthors have worked together and written a case where a protagonist is part of the case writing team. The protagonist seems keen to highlight certain positive aspects of their organization and may be susceptible to editorial bias
GUIDELINES TO DISCUSS	 Establish authorship (assuming the experienced case writer will be the lead author). Discuss and set standards around how decisions will be made regarding what is included from the protagonist's voice and organizational details. Note: Journals will often have guidelines for these case writing situations, and adding other voices in the case will ensure differing perspectives also exist. Review the case writing process, timeline, and goals of the publication, as the protagonist may have assumptions that are inaccurate, and the experienced case writer may not be aware of their vision or motivation for this collaboration.

Scenario Two

STRENGTHS OF TEAM	 Two-thirds of the case authors have strong experience in case writing. Two disciplines have expertise, and there are two authors who share the same institution and location.
POSSIBLE CHALLENGES OF TEAM	 There could be significant differences in the power dynamic because one author has significantly less experience than the others and may not be encouraged, or be apprehensive, to provide input. The two senior faculty members are familiar with each other, so the new case author may experience a lack of familiarity and connection with the others
GUIDELINES TO DISCUSS	 Discuss authorship to ensure all three authors have a clear understanding. Discuss how the team envisions the process occurring with two authors in the same city and one remotely located. Identify how the roles of the case will be decided, the positioning of the case, and which theories are included, with an overlap of expertise as well as two distinct disciplines represented.

Scenario Three

STRENGTHS OF TEAM	 All members of the team are experienced case writers. All members of the team are excited to write a case focused on the strategy discipline. There is a recognition and appreciation of each other's strengths as case writers
POSSIBLE CHALLENGES OF TEAM	 Determining authorship, since all three authors have similar discipline and case experience as well as rigorous research expectations. Identifying how to work together across three different countries and time zones. Recognizing there may be language barriers with one of the authors if the spoken and written language of choice is English.
GUIDELINES TO DISCUSS	 Determine the goals of the case writing process to ensure it meets all the institutional research requirements. Identify roles for the collaboration and order of authorship based on team members' criteria for contribution, skill set, and experience with case material. Choose platforms to share and review work and ways to communicate that respect the possible language barriers and different time zones.

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Notes

¹ This saying can also be loosely translated as "Better a minute of blush (a.k.a. red) than a lifetime pale (a.k.a. yellow)," suggesting that it is worth to discuss potential issues up front, facing difficult conversations decisively, in order not to regret later what was not addressed early on.